

# A Survival Guide for Future FASFAA Presidents

## Contributors

This guide was written and printed in May, 1996 for use by members of the Florida Association of Student Financial Aid Administrators who desire to become, or have been elected to the office of President-Elect.

FASFAA Past Presidents who contributed to the writing, editing and publication of this guide are listed below, with the year they served as President of FASFAA.

### Writers

Don Baldwin, 1972-73  
David M. Bodwell, 1983-84  
Claudia S. Geary, Chair, 1993-94  
Mary McKinney, 1994-95  
Sis Sebree, 1984-85  
William K. Spiers, 1989-90

### Editors

Laurence Benson, 1975-76  
Judith S. Berson, 1988-89  
Peggy Loewy-Wellisch, 1991-92  
Ray Pranske, 1992-93

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## **Introduction**

Congratulations on becoming FASFAA President-Elect! This guide has been prepared by former FASFAA presidents to assist you in preparing for your role. Although FASFAA has an extensive policy and procedure manual, each president-elect brings to the role a unique style and perspective. And while FASFAA provides a framework for the role, there are many aspects of the position which are at the discretion of the president. Experience is often the best teacher, and this guide is intended to offer practical advice not found in actual policy or procedure.

Since it is expected that any incoming leader has basic leadership skills, information of a general nature has not been included. Instead, we have focused entirely on areas which are very specific to FASFAA. It is also expected that an incoming FASFAA President will have served in various leadership capacities within the organization over a period of years, and is familiar with how the organization operates, the issues that the Board has dealt with in recent years, and all policies, procedures and traditions.

The Past Presidents of FASFAA offer you our sincere best wishes as you embark on this exciting experience. There is no greater professional honor than being recognized and elected for leadership by your peers. In addition to the work, being President of FASFAA can be a thrilling, once-in-a-lifetime experience. Enjoy it! We hope this guide will be of assistance to you.

Good Luck!

## **CHAPTER ONE**

### **RESPONSIBILITIES AND TIME COMMITMENT**

#### **Responsibilities of the Office of FASFAA President**

During your term as FASFAA President you will accomplish tasks you thought were impossible, work like you've never worked before, and grow as you constantly find yourself performing the multiple roles of historian, realist, and visionary.

As HISTORIAN, you'll realize that FASFAA truly is a young organization, and its rapid growth is unmatched by any other education association in Florida. You should read and understand FASFAA's history of achievement and take pride in its accomplishments.

With FASFAA being so young, many of the people involved in past accomplishments are still members, and willing to help you. Your leadership team should include some of these "seasoned" members, but you must recognize the importance of bringing "new" people into leadership roles. Also, never be critical of past officers, committee chairs, projects, etc., as you may need their support.

Your presidency allows you to seize the opportunity to be a VISIONARY, and contribute to the long list of accomplishments of FASFAA! You should have a well-conceived theme, motto, slogan, by-line, phrase, etc., that serves as the foundation for your tenure. Moreover, it will serve as your mission statement outlining the association's direction.

Additionally, try to have a couple of original and creative projects for the year, even if they seem controversial. (Incorporation, newsletter advertising, and regional representation were innovations which were all

controversial when first introduced!) Your initiatives reinforce FASFAA's image of being a dynamic, creative, and enviable professional education association.

Perhaps the most difficult role for the FASFAA president to assume is that of REALIST, simply because there is so much unbridled enthusiasm. Some suggestions for maintaining a realistic perspective are:

- Frequent communication with the entire membership is essential;
- Be prepared before you address the association, no matter how easy and trivial your speech may be...your audience will lose confidence if you stammer and struggle at the microphone;
- Fully understand and comply with the association's intentions in legislative advocacy, as you will have opportunities to discuss important issues with public policy makers and as FASFAA President you are to represent the views of the entire membership;
- Remember that 30% to 50% of the membership is new each year, so you must tell them the expected benefits of being a member of FASFAA;
- Be a prudent fiscal steward;
- Don't attempt too many new initiatives, as the year passes swiftly;
- Remember that your FASFAA role is voluntary - only a small minority of the membership will ever know how much time you've spent on FASFAA activities; and
- Assume an oversight role with the other officers, for even though they are elected by and responsible to the membership, their performance will reflect upon your term of office;
- Use good judgment in all of your decisions as President, as your decisions reflect in some way on every FASFAA member;
- Take time for yourself and your personal life during your term of office. Don't forget to **make** time for your family members and/or "significant other" so they won't feel neglected. **Schedule** dates with your family and include them in your day planner.

The membership looks to each president to provide leadership, to be a role model, to manage the business of the association, to inspire the membership to want to participate in association activities, to represent the highest standards of fiscal integrity and impartiality and to set an example for future leaders.

The President of FASFAA is the most visible financial aid administrator in the State of Florida for a one-year period. Use this visibility to create, maintain and enhance a positive image of the Association to those outside it and to those members who look to you as their leader. You can also enhance your own professional image by the job you do as President. (Several former presidents have experienced career changes and promotions after their terms in office!)

### **Time Commitment**

Those Presidents who were able to master the fine art of delegating, have actually found the presidency "easier" in some ways, than other FASFAA positions (i.e. Vice President of Training, Conference Chair, etc.) Nevertheless you will be "on call" virtually 24 hours a day to solve problems, make decisions, resolve disputes, and motivate committee chairs. Yes, the presidency is a full-time job. (Hopefully you knew this BEFORE you ran for the office!) Your home life, work life and community involvement will be affected. Because you can't do it all, you will need to learn to scale back certain activities, delegate, defer, or when all else fails, the fine art of just saying "no."

Association responsibilities will affect your work day at your institution and acknowledging this in advance will be helpful. FASFAA responsibilities may also require you to be away from your office a considerable number of days (perhaps 10-15), depending on your previous involvement. Furthermore, even when you are in your office, you can expect to spend about 20% of the day on the phone conducting FASFAA business!

To what extent and in what manner you should advise your supervisor of the time you are spending on FASFAA activities during the year is an individual decision (although it is expected that you would have discussed this issue prior to your running for office). However, this can be an excellent opportunity to show your supervisor your skills in strategic and operational planning, staff training and motivation within your office.

It is also a fine time to demonstrate the visibility you will gain for your institution during your tenure. Publicize your activities on your campus so that all are aware of the resource you bring to your school. Institutions that support professional development opportunities and encourage your participation may provide you with some relief for your office responsibilities, or at a minimum, be appreciative of your leadership role. You may want to consider in advance of your year as president inviting your supervisor to attend any FASFAA conferences and decide to what extent you should keep your supervisor or other administrators informed of your role, your activities and your time commitment.

### **How Association Work Will Affect Your Staff and Their Workload**

Obviously, the responsibilities of your "regular" job won't cease for a year, so it's wise to anticipate and manage this, especially since the job pays your salary! You should consider:

- Planning to work many late nights and weekends;
- Identifying and delegating some of your job tasks, yet being available for important decisions and deliberations;
- Advising your staff that you trust their judgment and have confidence in their ability to perform new and more challenging tasks;
- Providing ongoing positive reinforcement for any additional workload they may have assumed;
- Asking a secretary or student worker to be your unofficial FASFAA assistant during the year;
- Trying some different strategies to help you manage your FASFAA time more effectively, such as designating a certain period of the day for FASFAA calls, scheduling phone meetings instead of "playing phone tag," delegating as many FASFAA tasks as possible to appropriate committees, etc.
- Seeking ways to recognize staff through rewards, gifts and perks.

## **CHAPTER TWO**

### **PLANNING**

#### **Effective Planning**

The key to ensuring that the year runs smoothly for the membership **and** for your own benefit regarding your job at your institution, is effective planning. The more you can have thought out in advance, the better prepared you will be during the year. In terms of handling the needs of your office, we offer the following advice: PLAN, PLAN, PLAN! There will always be unexpected issues or problems which will require time you hadn't anticipated, but with the expected activities on track, you can more easily handle the surprises.

#### **Preparing a Two-Year Calendar**

One of the most helpful tools for planning your year as President-Elect and your year as President can be the development of a two-year calendar *for your own use*. It is very different from a calendar that you might publish as part of the Newsletter, indicating the major association events for the year. It is for you to keep on schedule for the activities you are responsible for, and for the decisions which need to occur. This activity should begin

as soon after you are elected as possible. By then you will already know when the upcoming conferences will be held, and although some specific dates have not been established, generally you will know in what month certain activities occur. For example, you can expect that SASFAA will hold a certain number of Board meetings and by the time your year as President begins, those dates will probably have been finalized.

Many activities occur routinely each year, but if you do not have a direct role to play in the activity, you may not want to list it on the calendar. You may prefer to map out all of these events on your calendar.

As President-Elect, you have a major responsibility for Nominations and Elections. You will see when you read the policy and procedure manual that you will need to work backward from the required dates to establish your own working timetable. For example, if you know that the ballots must be mailed prior to March 1, then you must allow for the other activities to be accomplished prior to that time.

The calendar can also be used as a timetable for establishing goals for yourself. Although most of the work is being done by committees, it can help a committee to agree upon a timetable for making decisions. If your calendar is used for this purpose, then you will need to make sure that you coordinate with the committee chairs. Following is a sample calendar which maps out the various events you may want to plan for. Remember, however, that the calendar which follows was based on a particular year; yours will vary depending upon the conference dates, etc.

#### Two-Year Planning Calendar

	President-Elect	President
July	Solicit nominations from membership	Attend NASFAA conference Attend SASFAA Board meeting Identify and publish goals
August	Make phone calls for nominations if necessary	Hold Board Meeting #1 Develop master calendar for publication to membership Send President's letter to membership or write welcome for Newsletter Membership Directory to be published Begin preparing your remarks for Fall Conference
September	Meet with Regional Reps to develop slate Send letter to candidates advising about conference expectations Get slate approved by Executive Board Attend FASFAA conference	FASFAA Newsletter to be mailed Hold Board Meeting #2 Attend Fall Conference
October	Develop volunteer form Select conference chairs for Fall and Spring conferences	Begin organizing FA Awareness activities Finalize training activities for year

November	Begin thinking of theme, projects, possible appointments, etc.	Attend SASFAA Board meeting
December	Continue developing plans	Hold Board Meeting #3 Send holiday cards
January	Mail volunteer form to membership	FA Awareness Week/Month Newsletter to be mailed
February	Begin collecting responses Mail ballots Attend SASFAA President-Elect meeting	Attend SASFAA Conference and Board meeting
March	Count ballots Attend Executive Board Meeting Attend Experienced Aid Workshop	NASFAA Leadership Conference Hold Board Meeting #4 Attend Experienced Aid Workshop
April	Announce results of election Meet with Treasurer and others to develop budget for next year	Begin working on Annual Report Begin preparation for Spring Conference
May	Have budget approved by Executive Board Attend FASFAA conference Finalize appointments Revise FASFAA brochure Buy plaque for outgoing president Begin planning the retreat	Newsletter to be mailed Finalize speeches for Spring Conference and awards ceremony Prepare for conference
June	Hold retreat Follow up with those who didn't attend Print stationery, brochure and other forms Decide about having FASFAA activity at NASFAA conference	Hold Board Meeting #5 Attend Spring Conference Attend SASFAA Board meeting Finalize and mail Annual Report to membership

### **Mapping Out Your Plan**

How often have you thought, "If I were President, I'd....." Well, now is the time for you to finish that sentence!

Chances are that by the time you have been elected you have already had a number of ideas you'd like to consider. Begin to make a list of goals and ideas as early as possible. They can later be worked into your goals and your calendar. This section addresses ways in which you can put some of those ideas into place.

### **Selecting a Theme**

Most recent presidents have had a theme for the year. This is something you should give careful consideration to before making a decision. You may wish to discuss some possibilities with a group of informal advisors or perhaps with the officers who will serve during your administration. As mentioned earlier, it should serve as a

foundation upon which the activities of the year can be built. It should have meaning for most or all of the members, be somewhat inspiring if possible, be concise, and it should be a theme that you can be able to talk and write about during the year. It can also help you to focus some of your ideas into a coordinated program.

Once you have some possibilities lined up, it may be helpful to ask yourself some of these questions: Why does the theme have meaning? How does the membership relate to it? Is it a positive thought? Does it relate to an event? Does it reflect your values or the perceived values of the membership and/or the profession as a whole? If you can answer these and it is something you feel comfortable with and the members won't tire of after hearing it for an entire year, you probably have a winning theme.

Here are some themes of recent years:

"Together We Grow, Together We Go Into the 21st Century" 1995-96

"Promoting Excellence Through Communication and Cooperation" 1994-95

"We Make a Difference" 1993-94

"Celebrating 25 Years of Excellence...Sterling Reflections, Glimmers of Gold" 1992-93

"Unlock the Potential" 1991-92

"Professionals With A Vision" 1989-90

"We Touch the Future" 1988-89

After you have decided on a theme and you have a general idea of what you'd like to accomplish for the association, you might want to spend some time thinking about any special projects or activities you'd like to put into place during your tenure. One of the wonderful things about FASFAA's existing guidelines is that there is room for experimentation and new innovations in addition to our traditional, long-standing activities. The reason you'll want to consider this early on is so that your structure can accommodate any of these new ideas you may have.

## **Organizational Structure**

Members at Large:

Although the organizational structure is established in the Bylaws, there are some areas in which there is some discretion of the President involved. The structure of your Executive Board consists of six elected officers, five elected regional representatives, and up to five members-at-large. All of these positions have a vote on the Executive Board. However, FASFAA normally has more committees than is accommodated by the five member-at-large positions. This has been addressed in two different manners in recent years. In the first, committee chairs are appointed by the President and the President indicates whether that individual committee chair will be a voting member or a non-voting member of the Board. The non-voting committee chairs are usually included in all Board meetings but do not vote. Another method, used in two recent administrations, is to appoint committee chairs and group a number of similar committees under a member-at-large. In this manner the member-at-large is the voting member of Board and the individual committee chair is not a voting member; the rationale for this is to provide the voting authority to those who have a wider range of responsibility. It also helps the President by spreading the responsibility for committee management to other Board members.

Committees:

There are some standing committees which must be appointed each year. These are listed in the Bylaws and in the policy manual. Other committees are established at the will of the President. It will be your decision as to what other committees are formed. In virtually every year, there is a Membership Committee or Chair, a Newsletter Committee or Editor, and Federal and State Legislative Committees. Other committees, such as Public Relations, Research, History, Financial Planning, for example, have appeared from time to time based on the needs of the association or the current president. In addition, you will see that in previous years committees



have been formed to accomplish a specific project and the committee has either been named according to the project, or it has been grouped under a heading called Special Projects. How you structure this depends upon how many committees you wish to form and a variety of other factors.

It is also possible to assign a group to be responsible for a function without forming a special committee. For example, if you believe the association should do something to develop new leaders of FASFAA, you could choose one of three options: appoint a committee chair, assign the task to another committee (Training?) or make it the responsibility of the officers.

However you decide to set up the member-at-large positions and committee chairs, make sure that each member of your Board and each committee chair knows whether they are to vote or not. This should be indicated to them at the time you ask them to serve. You should also advise them who is expected to attend each meeting. For example, you may want every committee chair to attend every meeting of the Board; you may want to invite only those who have an action item for that particular meeting. Whatever you decide, be sure everyone knows the expectation and the necessity of meeting all timelines.

A major concern in selecting a structure is the cost to the association. The more committees which are formed, the higher the administrative costs for meetings and other such expenses. You should consider that it is usually not a good idea to assign too many tasks to one committee. On the other hand, although you don't want to have too many committees, they allow for wider participation of the membership. Look for balance between the cost and the number of participants.

#### Past Presidents' Council:

Each past president is automatically considered to be a member of the Past Presidents' Council; however, this council has not been active in every year. The Council has, historically, been given a project by the President to undertake and complete. You may wish to activate the Council during your year as President. The most important aspect of using the Council is to make the assigned project one that is relevant to individuals who may or may not still be active in FASFAA. Since many are retired, they do not have travel funds to attend meetings and some do not have recent experience. Thus it is important to consider very carefully the charge of the Council. Usually the Immediate Past President serves as the Chair of the Council.

#### Parliamentarian:

You should also assign someone to be the official parliamentarian for the year. Ideally this person should be a *non-voting* member of the Board. The function of the parliamentarian is to make sure that business is conducted according to Robert's Rules of Order. In many years the parliamentarian's role has been expanded to include responsibility for making sure that policies and procedures are followed. It should be noted that the President still maintains the ultimate responsibility for these functions, but a parliamentarian can greatly assist the president in this role. As President, you should be thoroughly knowledgeable in running a meeting according to Robert's Rules.

### **Goals and Objectives**

How you address your goals and objectives for the association is also of personal preference and your management style. Some presidents have made goal-setting an official function of the Board at its first meeting or at its retreat. This can be done as a group activity or in small groups. The success of this activity may be based on the individuals involved, the amount of time spent on it, the commitment to use the goals established as guidelines for the year, the degree to which the goals are communicated, etc. Other presidents have formulated two or three overall goals on their own and have put a structure into place to accomplish those goals without formalizing them.

Objectives are frequently set by each individual committee and for the most part are under the direction of the committee chair. If you have any specific objectives you think the committee should accomplish, these should

be agreed upon in advance with the committee chair. How you wish to undertake the process of setting goals and objectives is entirely up to you.

## **CHAPTER THREE**

### **FISCAL MATTERS**

#### **Association Budget**

As the President of FASFAA, you are the chief operations officer of the Association. This responsibility carries with it a responsibility for the Association's finances, from the budget to the administration of the funds. Though it is easy to attempt to relegate all budget activities to the elected Treasurer, you will always bear ultimate responsibility for budgetary matters. As you prepare for your year, plan to include time for fiscal matters.

Communication with the Treasurer is essential. If you are elected the same year the Treasurer is, then you will have the advantage of working with the individual for one year prior to your term as President. This will allow you the opportunity to get to know the person and discover his or her strengths and weaknesses, giving you the opportunity to plan your oversight of the fiscal areas accordingly. If the Treasurer is elected the year you assume the presidency, you will need to begin dialogue with that individual soon after the election. Remember, even though the Treasurer was elected by the membership, you are the leader and bear ultimate responsibility for the Association and its finances.

#### **Preparing Your Projected Budget**

When you are elected, one of the first tasks you face is deciding what you want to accomplish in your year. The start of this process is the dream phase, while the conclusion is reality. What you want to do, and what you can do are often two distinctly different things. Usually what you can do is a focusing of your dreams into the reality referenced above. Part of the reality you are called to deal with is your budget. It is your job, with the guidance of those around you and those you have selected to work with you, to create the budget for your year. As you begin this process you must ask the following questions:

- What do I want to do in my year?
- What can I afford to do in my year?
- What is the budget for the current year?
- Are we meeting budget?
- How much of an increase in budget can I realistically expect?
- What are my sources of revenue?
- Is there anything pending that could impact revenue?
- What items are in this year's budget?
- Which items in this year's budget do I need to keep?
- What items in this year's budget can I eliminate?
- What are the association's fixed expenditures?
- What are the association's variable expenditures?
- What are our current reserves?

- Are our reserves enough to cover an emergency?
- What are the association's liabilities?

When starting to construct your budget, begin by looking at budgets for the previous three years. Review the strengths and weaknesses of each and make assumptions for your year based on actual revenues and expenditures, allowing for changes in membership dues, conference fees, projected membership and sponsorship. Project the cost of the events and activities you would like to hold in the year you will serve as president. Add up your projected revenue and begin subtracting your expenses. When you reach zero, stop and re-evaluate. To project an increase in revenue beyond what has occurred over the last three years is not wise. If you over-project revenue, and break the budget, your year as president will be negatively stigmatized. Use sound judgment.

Cost projection is never easy. Try to estimate costs for the current year and add 5%. This is not perfect, but it is usually safe. The 5% will need to be adjusted if you take office in a period of high inflation.

One of the most difficult cost projections you have is for conferences. As you are establishing a budget, talk with the Site Selection Chair and find out what current food prices are. This is the area that is most elusive in conference costs. Care must be exercised in determining reasonable levels of sponsorship for regularly sponsored conference events, especially high-cost meal functions. Consultation with an experienced Vendor/Sponsor Coordinator is essential in understanding the impact that effective sponsorship can have on the success of future conferences (as well as the current event).

Estimating membership for your year is vital, since much of your revenue comes from membership dues and attendance at conferences. Looking at your environment is critical. You must know if anything could affect the size of FASFAA. Remember to look at potential state and federal reductions that could impact institutional budgets. If a school cannot pay memberships, then the number of members will decrease. Should you have an increase in the cost of FASFAA membership or conference fees in your year, anticipate a smaller membership.

You should be very familiar with the extent to which FASFAA relies upon sponsorship to conduct its activities throughout the year and how sponsorship impacts the budget. If there is an increase or decrease in sponsorship for particular events, there can be a dramatic effect upon the budget. As you prepare your budget, it is critical to know the percentage of revenue that comes from sponsorship, membership dues and conferences.

Work with other elected officers and committee chairs of the association to determine their budget needs. As you have an elected Vice President for Training, you must find out what his or her plans are and try to fit them into your budget. Remember, you are the President and this is your budget. If you feel any proposed expenditure is exorbitant or unnecessary, express your opinion up front. Be honest and candid with those who have some control over your budget, but stand firm if you feel you must.

You may wish to ask the prior Treasurer and the newly-elected Treasurer to work with you to establish your proposed budget. Don't hesitate to ask previous presidents and treasurers about their experiences with budgeting. Each one has a success story and a failure to share with you. By utilizing their collective knowledge and experience, you can avoid some of the pitfalls that you might otherwise face.

### **Understanding the Nuances of FASFAA Finances**

FASFAA uses the cash accounting method of keeping its fiscal records and follows generally accepted accounting principles. This statement is taken from the Policy and Procedure Manual. Though this tells you the system we use, it does not provide you with the nuances of the system.

The cash accounting method is a relatively simple accounting system and works well for an association like FASFAA where we have relatively stable monthly receipts and expenditures. One of the faults of this system is that it does not adequately reflect the true standing of the association. An example of this is when we receive pre-paid dues. Though we have received the money, the funds are really not available for use in the current fiscal year. Since we must recognize this, we often have to create new funds to keep our records in order, or we must carefully notate files to recognize income or expenditures for previous periods. Generally the Treasurer is charged with the oversight of this process, but as President it behooves you to take note of the potential problems of our system. In this system the following constitutes a set of books:

- Cash Disbursement Book
- Cash Receipts Book
- General Journal
- General Ledger
- Trial Balance

You should make sure the Treasurer is cognizant of these needs and that appropriate documentation exists for your annual audit.

Additional statements in the Policy and Procedure Manual require that the fiscal records of the association be maintained by the treasurer, all fiscal records will be reviewed at least annually at the close of the fiscal year and that fiscal records of the Association are open to the membership. Again, it is your responsibility as the chief operations officer to make sure these statements are true.

The Executive Board is charged with the responsibility for overseeing the budget and as such operates as the Budget Committee. It is important to make sure that all Board members understand the finances of the association, can properly read budget performance summaries, and take appropriate actions regarding the budget. The Board is also charged with the responsibility for determining how the audit will be performed.

Plan to review the budget regularly with the Treasurer on a more frequent basis than at Board meetings only. For example, you may wish to do so on a monthly basis and just prior to each Board meeting. This will help to ensure that the finances are being monitored frequently and by more than one person. It will also help you to address any questions which may arise at Board meetings and to take heed of trends which may be occurring. You may also wish to consult with key committee chairs to help ensure that they understand the importance of self-monitoring their specific budget lines, as they will be approving expenditures for their committee activities.

Though the Treasurer is authorized to pay bills, you will often have the responsibility of approving expenditures. When reviewing a bill, make sure that every expense is legitimate, that policy and procedure has been followed and the expense is in the best interest of the Association. The Policy and Procedure Manual has outlined what legitimate expenses are. If you follow the guidance provided and use good judgment, you should not have problems in this area.

In all organizations the unusual happens. Many times it is not covered in the budget or in policy. Should this happen, and it probably will, you must make a decision that will require sound leadership. Whatever decision you make, it is imperative that you communicate it to the Executive Board as soon as possible. If a decision cannot wait until the next Board meeting, you may need to conduct a meeting via telephone to obtain a vote. Be sure to follow the procedures outlined in the policy manual for conducting telephone meetings in which voting occurs. A budget is a guide, and many times a guide must be altered to accommodate reality. Though significant changes should be avoided, when they are necessary you should feel free to move forward with them. One fiscal area that frequently requires the interpretation of policy regards sponsorship. You should be extremely familiar with the sponsorship policy and be prepared to assist the Treasurer and Sponsorship Chair if a situation arises that requires your good judgment.

If you always remember that the Association's finances are not your own, and that you are the individual entrusted by the membership to guarantee a sound fiscal program, you will understand the serious responsibility you have to the membership. Leave the finances better than you found them and make changes to the system as appropriate.

## **CHAPTER FOUR**

### **YOUR VOLUNTEERS AND ELECTED OFFICERS**

#### **Nominations and Election Responsibilities**

Nominations and election responsibilities will impact your tenure as both President and President-Elect. The first time you will address this area will be as President-Elect as you will chair the Nominations and Election Committee. Your second experience will come as President when you will oversee the President-Elect as chair of this committee. Both responsibilities are important and deserve your careful attention. As the chief elected officer, you have a responsibility to the Association to ensure the continued growth and success of FASFAA beyond your year as President. Though it is easy to look at your year as your only priority, and you will naturally give it the bulk of your attention, you have been elected to strengthen the foundation of FASFAA. It has been said that you can tell a good leader because in the leader's absence the organization can continue to function. If we fail to provide strong leadership after we leave the presidency, our success as leaders is questionable.

As President-Elect, your duties with regard to nominations and the election will include the creation of a timetable, solicitation of suitable nominees, review of the nominees by the Nominations Committee, correspondence with candidates, a report of recommendations to the Executive Board, preparation of voting materials, supervising the voting, counting of ballots, notifying the candidates and membership of the winners and destroying of the ballots. As you can see, this is a very time consuming project for which you need to schedule sufficient time.

When you assume the presidency, your focus on nominations and the election is more managerial. You have the responsibility to make sure the Nominations Committee follows the By-laws and policy and procedure; to make sure the schedule of events for nominations and the election process is accurate; to review the potential list of candidates prior to the Executive Board meeting to confirm that they meet the qualifications for office; to arrange for the conference committees to schedule appropriate amounts of time to allow for the Nominations Committee reports; to present the candidates in a general session and obtain approval of the slate by the membership; and to make sure that the election procedures are followed. Further, as President you have the responsibility to ensure that the newly elected officers and Board members are assimilated into the governing structure in an orderly manner. Though you do not have the responsibility of carrying out the nominations and election process, you are still an integral part of it.

#### **Timetable for Nominations and Election**

As President-Elect, one of your first actions should be to establish a timetable for the nominations and election process. Guidelines for this are found in Article VI, Section 2 of the Association By-laws and Section 5.1.1 of the Policy and Procedure Manual. Upon your election you should acquaint yourself with both of these documents as your position as Chair of the Nominations Committee begins the day you become President-Elect. Since this guidance is clear and accurate, our focus will be on events prior to July 1 and additional suggestions to enhance the information for the other periods of time.

Upon election you must begin soliciting recommendations on potential candidates from current leaders, past leaders and the membership in general. It is equally important that you evaluate potential leaders based on your

past experience with them. Individuals who consistently rise to the top should be contacted and encouraged to run. If the person you are interested in is not in a director position, you may want to speak with the director first to ensure support of the person's candidacy. Though a supervisor may allow a person to run once they have been asked, they may not give the person the support needed to accomplish the task. All individuals contacted should be encouraged to speak with their supervisors for approval, prior to allowing their names to be submitted to the Nominations Committee.

Though the time line established for the Nominations and Election Committee indicates that July or August is the time to send out the solicitation for nominations, you are encouraged to begin this process as soon after July 1 as possible. Since some positions will have only one person nominated, if you wait until August your time to locate additional qualified nominees will be dramatically reduced. This is even more important if the Fall Conference is scheduled for September instead of October. Allow yourself the time to carefully review the list of nominees and locate additional nominees if necessary. If you wait until August, you may not be able to do this.

Your committee is made up of the Regional Representatives. You should involve them as soon as possible so that they can solicit candidates for officer positions as well as regional representatives.

In June you should develop your form for solicitation for nominations. If the sitting Executive Board will authorize the expenditure, you could have this document printed in June so that it will be ready to mail in July. Though this may seem insignificant, when you work with printers you discover that allowing a few extra weeks is always in order.

Another issue when selecting candidates is the rare occasion when you have too many nominees. The Nominations Committee has a job to do, and that includes presenting the slate of officers they feel are the most qualified. Though it would be easy to submit every name nominated, this is not in the best interest of the Association, and enhances the need for a special run-off election. As difficult as it may be, select the individuals the committee feels are most qualified and submit only those to the Executive Board.

A crucial issue is how you inform nominated individuals they were not selected. When corresponding with these members, remember that they were willing and very possibly capable, so protect their dignity. Make them feel valued and, if appropriate, find them a place of service on one of your committees during your year. Keep them involved! You should inform individuals not selected as soon after your meeting as possible. You should do this in writing.

Confidentiality is mandatory for the Nominations Committee. As Chair of this group, you must demand that your conversations not be repeated outside of your deliberations. If your ability to discuss the candidates is hindered because your committee does not understand this, you are not fulfilling your role as Chair. Give explicit instruction at the start, and if at all possible, in writing before the Nominations Committee meets.

When the candidates are presented to the membership, be prepared for nominations from the floor. They do happen, and if you seem to be confused, the process will not move smoothly. Read your policy section on this issue. We are an organization based on parliamentary rule, so do not view these nominations as an attack on you or your committee's effort, but rather as members exercising their rights and responsibilities.

### **Coordination With The Making of Appointments**

Earlier it was stated that you should look at individuals nominated as potential candidates for service in your administration. Though you should not do this to the detriment of your year, it does build camaraderie when you appear inclusive of those who have been nominated for a position, or those who lose an election. Even the least experienced individual can provide some service in a non-crucial area.

As you plan your Board, you might want to review the people who are nominated for positions and make plans to include them as an active part of your Board or as chair of one of the committees you must assign. This gives them the opportunity to provide service to the organization, which may help them prepare for future elections. By including them, you are also building the new leadership of our organization, thus laying the leadership foundation we referred to earlier.

Since you chair the Nominations Committee, you will have at your disposal the biographical information on these individuals. You will also have the opportunity to discuss their strengths and weaknesses with others, which will help you decide the best areas in which to use their talents. It will also help you decide if they should be utilized as voting members of your Board.

If you feel it is impossible to use someone, use your best people skills to inform them they have not been selected. With the caliber of individuals in FASFAA, you will usually not face this concern.

### **Special Aspects of Volunteer Organizations**

There is a great difference between a volunteer organization and one which pays its workers. And although the skills required for successfully administering volunteer organizations are the same ones, people's perspectives are different. The leaders of a volunteer organization must often *persuade* participants to do the tasks necessary.

Milton Greenberg of American University has stated, "Many volunteers take their obligations seriously, but others feel free to shirk or postpone them. Many well-known people lend their names to an organization's letterhead but never participate beyond that. Fortunately, in most such organizations, a small, dependable cadre of volunteers exists that can be counted on to do most of the work. Ironically, the volunteers behave as though the volunteer commitment were, in fact, paid work."

It is important to recognize that each FASFAA member has a full-time job, just like you. And although you have made a commitment to serve in a capacity that will require a great deal of your free time over the next few years, not all members will share the same level of commitment, nor feel the same responsibility.

It is a common problem in a volunteer organization for some of your volunteers to fall short of your expectations. Work, family, and other factors can impact someone's ability to participate to the level you had planned. That's why the concept of teamwork within FASFAA is so essential: your best team members will pull together to fill the gaps when someone else doesn't come through. Your challenge as president is to maximize the abilities of your volunteers and minimize the number of appointees who cannot or do not carry out the responsibilities they have assumed.

### **Soliciting Volunteers**

During the year you are President-Elect, you will want to solicit volunteers from the membership. This should usually occur no earlier than mid-year, as you do not want to conflict with or confuse the current year's activities. A variety of different types of forms have been used. They can be distributed at conferences, mailed to each individual, included in the Newsletter, and/or disseminated at training workshops and regional meetings. The Appendix contains samples of volunteer forms which have been used in the past.

Once the forms are returned, you may wish to enter the information into a database or listing for future use. In making your leadership appointments, you may not need to refer to the forms to any great degree, however, at some point you will need to provide the data to your committee chairs for their use in making committee appointments. Some organizations, such as NASFAA, require individuals to submit a volunteer form in order to serve on any committee. Although FASFAA has not been quite so strict in adhering to that rule, FASFAA does make every effort to ask the volunteers to serve in some capacity.

### **Considerations of Making Appointments**

Although several of the individuals you will work with during the year are elected by the membership and are responsible to the membership, it is your job to help them succeed. In addition, there are many others who you will need to appoint to various positions. One of the best ways to help your elected officers is to surround them with capable appointees. These appointments can mean the difference between a very successful year and a mediocre one.

First, you will want to strike a balance between enthusiastic individuals with no past record of service along with those who have a record of responsibility and accomplishment. By all means, we want to encourage volunteerism and assist our members in becoming active within the organization. The key, however, is in making sure that your appointee has the background, skills, experience, or potential for the job. Volunteers with little or no experience within the organization would probably feel more comfortable serving on a committee or as part of an informal team than as a member responsible for a major function of FASFAA. Because you want to create positive experiences for new members, you would not want to place someone in a position where the person will not be successful. This can discourage their future involvement in the association. In making appointments, review the person's past record of performance. Has he or she held offices previously? Did the person perform responsibly and effectively? How did the person interact with committee members/Board members/the membership at large? Is the person people-oriented or task-oriented?

For some positions, special skills, equipment, or knowledge is necessary. Be sure to consider this as well. For example, the Membership Chair is usually required to have a computer to house the membership database; the Site Selection Chair must be able to travel frequently to visit sites; the Newsletter Editor should have good writing and editing skills. One way to match positions with appointees is to first make a list of the "qualifications" needed for each position, then identify the talents of the people you are considering.

The third consideration is that of diversity. You will want to strive to achieve representation from all of the various groups within FASFAA. A balance should be sought regarding culturally diverse members (racially and ethnically); males and females; representatives of the various sectors (community colleges, state universities, private institutions, proprietary, vocational/technical, lenders, etc.); regions; very experienced and less experienced. You may wish to establish a particular goal for each committee, such as having at least one new member on a committee, or having a vice chair who can assume the chair the following year.

Because conferences play such an important financial, educational, and social role for FASFAA members, selection of effective conference chairs is essential. When selecting the chairs, you will want to pursue an individual who has experience with conferences. The critical nature of a conference should lead you away from a novice for this position.

Although you will want a seasoned individual at the helm, you will also want to involve new people on the committee in order to have experienced conference chairs for the future. Make sure your chairs are strong and well informed, and most of all, make sure they keep you informed throughout the planning process.

It is important to remember that the results of the election will play an important role in selecting your appointees. Be sure to allow for some last-minute revisions based on the election outcome. As stated previously, you may wish to appoint members who ran for office but did not win the election.



Although the President is not responsible for appointing all committee members, he or she does approve the appointments. Thus it is essential to communicate the considerations of making appointments with your committee chairs and the Board members who chair committees. All of the effort you spend in making appointments which are representative of the membership's various groups will be subverted if your committee chairs make their committee appointments without regard for these considerations.

### **Timetable for Making Appointments**

You should be thinking about your appointments as you start your year as President-Elect. By midyear you will probably need to appoint, at a minimum, the Fall Conference Chair, as a great deal of lead time is necessary for that position. By April you will know the outcome of the election. It is a policy of FASFAA to invite all of the incoming elected officers to the Executive Board meeting just prior to the Spring Conference. By the Spring Conference *before* you take office as President, you should have the majority of your appointments made. Shortly after July 1 you should be able to announce all of your appointments to the membership.

### **Support Functions**

Printing, distribution, inventory, membership mailings and other related functions are discussed here as support functions because they support all of the other activities of the association and are vital to having a successful year. There should be a coordinated effort to make sure that these functions work together smoothly, and it is the president's responsibility to ensure that this occurs.

During your year as President-Elect, you should begin to think about how you will set up these functions. Your Board and committee chairs will need a supply of stationery, FASFAA brochures, envelopes, FASFAA Flashes, FASFAA ribbons, and thank you notes as soon as the year gets underway. You may wish to start by examining the budget from the prior year on expenses related to such items and determine if we are spending too much or not enough on our printed materials. If our budget is excessive for stationery, for example, you may wish to use photocopies when mailing something to the entire membership instead of original letterhead sheets. Once you determine the amounts needed, who will store them? You may wish to appoint someone to handle your inventory, such as someone who is near the printer which is being used. This person can keep track of how much is being used and can advise you of when more needs to be printed. By checking with the Treasurer as you formulate your budget, you will know how much to have printed to get started and how much you'll need at various points throughout the year.

Be sure to get your materials printed as early as possible. Once all of your appointments have been made and you have verified everyone's phone numbers, your letterhead can be printed. Revisions to the FASFAA brochure can be made ready at the same time. Regional representatives and other Board members and committee chairs will need a supply of these.

One activity which can use substantial amounts of your time unless you plan accordingly is planning your Executive Board meetings. For your own use, you'll need to develop a mailing list of your Board members and committee chairs for mailings to them. Even if you wish to communicate primarily through electronic means, regular mailings should also be sent. You may wish to appoint the Secretary to send agendas of upcoming meetings; or whoever you have designated to coordinate the meeting (member of site selection committee) to mail the directions to the site, etc. At the meeting itself, either the Site Selection Chair or member can attend to details concerning rooms, room arrangements, payment, food, and all of the other necessary details which make for a smooth meeting.

Mailings for the entire membership are a coordinated effort of the Membership Chair (who supplies the labels), the Board member or committee chair (who determine when and what is to be sent), and the organization that may be doing the printing, folding, inserting, and actual mailing. For several years, we have been fortunate to have a vendor who has handled this function for the association, at no cost to FASFAA. You should make sure

that each of your leadership knows who to contact when they have to mail something, what the procedures are, what time frames are necessary, and what items should not be sent via the vendor. You may want to contact the vendor prior to the beginning of the year to determine if these costs will continue to be absorbed by the vendor and if there are any changes to the procedures. Then communicate such information at the retreat or first Board meeting.

The ability to generate membership labels is one of the most important functions of the association, as the success of all other activities rest upon timely communication with the membership. The Membership Chair should be familiar with the approximate dates when labels are needed throughout the year and be ready to produce them on a timely basis.

### **Your Retreat**

If you wish to hold a retreat for your new Board and committee chairs, it is usually done in the last part of June. This schedule allows for everyone to start the new year on July 1 with a minimum of transition problems. Presidents have used the retreat format to accomplish a variety of objectives, but for the most part the following should occur:

1. It is an opportunity for the Board members and committee chairs to get to know their colleagues and begin the process of becoming a team.
2. It is an opportunity to meet with first-time Board members or committee chairs to familiarize them with FASFAA policies, procedures, and expectations.
3. It is an opportunity for the President to provide specific guidelines regarding policies relating to Board activities.
4. It is an opportunity to make sure that all of your leadership knows what is expected and has the resources, knowledge and information needed to get started.

Since the retreat is paid for by FASFAA, it is essential that the primary activity be information sharing and not social. It enables the President to meet with the entire leadership prior to having the first official Board meeting. If used effectively, the retreat can be a wonderful opportunity to get your year as President off to a terrific start.

As with the planning of all meetings, site selection should have occurred the previous year and you should have been involved in the selection of the facility. The actual site can have a bearing on how you arrange the agenda, the meal functions, and other aspects of holding a meeting. Retreats are usually held in informal settings with a casual dress code.

In thinking about your retreat, it might be most helpful to ask yourself, "What is it I want everyone to take with them when they leave?" This will give you a start on what to consider as topics for the agenda. Ideally, you want your leadership to go away energized, enthusiastic, with a full knowledge of what they are expected to do, a timetable for getting their committee members selected, and can be able to begin work on July 1.

Since a number of activities require an early start, the retreat can also be used to hold some informal, small group meetings. An excellent example is the Nominations Committee, which functions under the President-Elect. This committee must begin work immediately after July 1 and the June retreat is an opportune time for the committee to meet and discuss how to proceed. Fall Conference, Sponsorship, and Treasurer are other areas which have responsibilities which occur early in the year and must be underway before your first official Board meeting.

Some sample agendas are contained in the Appendix.

A primary consideration of the retreat is cost. Your retreat will be included in the budget as a prior year expense. Sponsorship can be and is sought to help cover the costs, however, every attempt is made to keep costs as low as possible. You want to make sure that the cost to the association, and to the leaders who you've asked to give two days of their time to attend, is outweighed by the benefits gained. For this reason, it is advisable to spend whatever time is necessary to ensure that your retreat is successful and highly productive.

## **CHAPTER FIVE**

### **MEETINGS AND CONFERENCES**

#### **Conducting Executive Board Meetings**

As President, one of your primary duties is leading the Executive Board meetings. You will be responsible for establishing the agenda, notifying the participants, and making sure that someone has made the room arrangements, organized meal functions and ensured proper arrangement of the meeting room. Though these items may seem secondary to the purpose of the meeting, to have a successful meeting these details must be attended to.

Proper organization prior to the Executive Board meeting will facilitate a smooth meeting, which will be viewed as successful by the membership. If a meeting is disorganized or off the cuff, people will be uncomfortable and the meeting will seem sluggish and meaningless. Make sure your meetings are useful to your Executive Board members, and their positive attitude will reflect back to the membership.

When you assume the presidency, establish your Board meeting dates and locations as soon as possible, preferably at your retreat or shortly thereafter. This will allow Board members to plan their schedules and should improve attendance at the meetings. It will also allow the membership to attend Executive Board meetings if they would like.

The location of your meetings is important. Two of your meetings will be in conjunction with the conferences. The remaining meetings are at your discretion, and every effort should be made to keep them accessible and centrally located. The more accessible the meeting, the less expensive for the budget. If the location is central, you may have an additional decrease in expense. The difficult part is to be cognizant of regions and sharing the Executive Board with different areas of our state. Though location may seem simple at first, there are many complexities which you must face.

Your agenda is key to a successful meeting. Speak with your Board and find out what items should appear on the agenda. Discuss the length of items and encourage people to summarize written materials instead of reading them. If you do this while you are establishing the agenda, you will head off a potential problem in the meeting. Make sure you include all of the standard items on the agenda, and include new or old items as appropriate after consulting with your Board members and reviewing the previous minutes. When preparing your agenda, make sure you provide adequate time for each item, and be prepared to give appropriate direction to keep to your schedule. Remember, your agenda is a guide and should not be viewed as a concrete plan. In the best of circumstances things come up unexpectedly, so be prepared for this and make accommodations for these occurrences.

It is your job to keep the meeting moving and on task. Don't let people inject unnecessary conversation into the meeting. Save this for your social time together. People will always want to change a topic or alter a conversation. It is your job to keep people on track. You will benefit from this.

### **Executive Board Agendas and Decision-Making Timetable**

This section pertains to decisions made by the Executive Board. It will help you to do two things: to integrate certain decisions into the overall calendar for the year and to plan your agendas for Executive Board meetings. At Board meetings, some items of business must occur at a set time and you want to be sure that these are accomplished at the appropriate time. In most cases, your Board and/or committee chairs will already be prepared to ask the Board for approval of various items of business, but since it is your ultimate responsibility, it is helpful to plan for them in advance.

Following is a sample of the discussion topics and decisions which need to occur at each Board meeting. Note again that your year may vary from this example.

Executive Board Meeting	Topics of Discussion Decisions to be Made
#1 - August	<ul style="list-style-type: none"> <li>Follow up on retreat/transition issues</li> <li>Review expectations</li> <li>Make sure committees are on track</li> <li>Review conference plans</li> <li>Approve Fall Conference budget</li> </ul>
#2 - September	<ul style="list-style-type: none"> <li>Approve slate of candidates</li> <li>Full report of last Spring Conference due</li> <li>Approve SASFAA welcoming activity</li> <li>Approve Training calendar</li> <li>[After meeting: meet with officers to review flow for business meeting]</li> </ul>
#3 - December	<ul style="list-style-type: none"> <li>Approve any NASFAA award submissions</li> <li>Determine who will attend NASFAA Leadership Conference</li> <li>Full report of Fall Conference due</li> <li>Approve FA Awareness plans/budget</li> <li>Approve upcoming year conference sites</li> <li>Solicit candidates for annual awards</li> </ul>
#4 - March	<ul style="list-style-type: none"> <li>Approve Spring Conference preliminary budget/registration fee</li> <li>Approve plans and budget for outreach activity</li> <li>Approve candidates for annual awards</li> <li>Determine which Board members want their supervisors to receive thank you letters</li> <li>Review timetable for preparation of annual reports</li> <li>Approve any policy changes needed</li> <li>Approve audit report</li> </ul>
#5 - June	<ul style="list-style-type: none"> <li>Approve incoming President's proposed budget</li> <li>Thank the Board for their service</li> <li>Evaluation of year's activities</li> </ul>

## Conducting Business Meetings

Twice in your presidency, you will be required to conduct a full business meeting for the general membership. Generally FASFAA business meetings go without notice. Though this is generally the case, it is still important that you organize the business meeting and be prepared for whatever anyone might bring up. Failure to organize will put you in an uncomfortable position if you forget to follow normal procedure.

When preparing for the business meetings, find out what items normally come up in each one by reviewing previous minutes. It is also a good idea to review with the officers before the meeting what the agenda will consist of. You may wish to do this at the Board meeting just prior to the conferences, and determine which other leaders will be giving reports at the meetings. This will ensure that everyone is prepared. Make sure that any documents which are to be distributed to the membership at the meeting has been printed and is available for distribution. It is also helpful to have an agenda for the business meeting, even if it is provided only to the Board.

As in an Executive Board session, remember that under new business anything can come up. As moderator you are responsible for keeping the meeting orderly and to ensure that new business is handled appropriately. Even if you disagree with an item brought to the floor, you cannot speak to it unless you step down as moderator. If the item is controversial, follow parliamentary procedure carefully, so you cannot be accused of suppressing debate.

## Typical Business Meeting Agendas

The business meetings of FASFAA include reports from the officers, several standard items of business, and as many other items of interest as you have time to include. The typical agendas would be as follows:

Fall	Spring
Call to Order	Same as Fall.
Minutes [Call upon the Secretary for this. Copies of minutes of prior meeting are usually included in each attendee's conference packet. Ask if there are any additions or corrections, then take a vote.]	Same as Fall.
Treasurer's Report [Call upon the Treasurer to give a report. Then ask for a motion to approve the report, ask for any discussion, then take a vote.]	Same as Fall.
President-Elect's Report. [Call upon the President-Elect for a report of the Nominations Committee. After the report, ask for a motion to approve the report, ask for any discussion, then take a vote. Then you have to ask for candidates from the floor for each position. If there are none, ask for a motion to close the nominations. Then introduce each of the candidates for the officer positions to give three-minute speeches. If there are nominations from the floor, the closing of nominations and the	President Elect's Report. [Call upon the President-Elect to report on the results of the election. Afterward, ask for a motion to destroy the ballots, then vote. Advise the Secretary to destroy the ballots.] Advise that the Board approved the President-Elect's budget and refer

candidate speeches is done later in the conference. See the policy manual.]	their attention to it. Ask for a motion to approve the budget, then take discussion, and vote.
Vice President's Report [Call upon the Vice President for a report of training activities.	Same as Fall.
Immediate Past President's Report [Call upon the Immediate Past President to give a report on SASFAA Nominations.]	Same as Fall.
Other committee reports if time permits.	Same as Fall.
Old Business.	Same as Fall.
New Business.	Same as Fall.
Adjournment.	Same as Fall.

### **Conducting a Good Meeting**

Good meetings are characterized by organization and fairness. If you stay in touch with your Board, you will know the issues that need attention and will be prepared for them in the meeting. If an item has mixed support, you must demonstrate your ability to remain neutral while serving as moderator. Keep a positive attitude. To have a good meeting the following guidelines will help:

- Start on time.
- Have an agenda.
- Keep the discussion orderly.
- Be attentive to the needs of the Board members.
- Speak clearly.
- Insist on order.
- Make sure people listen to the speaker.
- Summarize the remarks of the speaker.
- Stop unnecessary or unrelated discussion.
- Retain control without inhibiting free discussion.
- Don't argue or permit arguments.
- Step down as moderator if you want to address an issue.
- Make sure good minutes are kept of the meeting.

### **Parliamentary Procedure**

Parliamentary procedure helps keep our meetings organized and on track. Though it is very formal, we are an informal organization at most meetings. Simply stated, we use parliamentary procedure as a guide, but we often allow issues to go through that have not followed every step in Robert's Rules of Order. Don't let this bother you unless you are in a situation in which people do not agree. In periods of conflict, follow parliamentary procedure carefully. If you are unsure how to handle an item of business through parliamentary procedure, ask the Parliamentarian. You may wish to have the Parliamentarian review the basics of making motions, voting, and other often-used procedures with the Board members at the retreat or at your first Board meeting. This will

help everyone become comfortable with the terminology and the way the meetings will be handled for the rest of the year.

The Policy and Procedure Manual provides some guidelines for parliamentary procedure. They are intended as a guide, and do not replace your need to study Robert's Rules of Order. You should familiarize yourself with both of these prior to each Board meeting and prior to each business meeting. Be sure to brush up on your knowledge of how to phrase what you'll need to say in each meeting. It is also necessary to have your Parliamentarian present at business meetings.

### **Time Considerations**

Starting and ending the meeting on time, along with observing scheduled breaks, may be the most important task you have. These things keep your members happy and confident and keep meetings moving along. Though this may seem simple and silly, it is vital to your success. One key to this includes allowing ample time for discussion. Make sure all discussion is free, but also make sure it is focused. A second key is making sure that every member knows the rules of the meeting. If people violate the policy, remind them that they need to refocus. Sometimes multiple issues will arise in one conversation. When this occurs it is usually helpful to separate these issues and determine which ones relate to the topic at hand, which ones should be dealt with separately, and which ones will not be addressed.

Discourage your Board members from reading their reports. Ask them to provide summaries. People hate for people to read to them, especially if they have already been given a copy of the written report.

Have fun and enjoy your experience as a facilitator and moderator. The experience will serve you well for the rest of your life!

### **The President's Role at Conferences**

In the year you serve as President of FASFAA you will have two opportunities to present yourself to the membership, and those opportunities occur at the conferences. Generally, the conferences are attended by up to half of the membership, and what you do, or do not do, often determines the success of your year for the general membership. Though FASFAA has many activities during a given year, and though we provide our membership with a wide variety of services, the conferences tend to stand out in the minds of the average member. Therefore you should give careful attention to your role at conferences.

### **What to Say**

While at the conference you must always remember that you are the President. What you say, or how you say it will have impact. Members listen to you as their leader and respond accordingly. One word of criticism or complaint from you will spread instantaneously. To say the least, a positive attitude, even in times of adversity, is imperative. It is important that what you say seem Presidential and carefully thought out. Sometimes the best response is no response, especially if you are in a crowd and someone comes to you with a complaint or criticism.

As President, you do not have the luxury of treating a member like an irate customer who you feel needs to go to another store. Unlike the customer, you have been ELECTED to serve each and every member and every member deserves a response, regardless of how ridiculous their attitude or timing. Though you may choose to not respond to an individual in a group setting, it is important that you remove the person from the group and

address the concerns. If you have to remove someone from a public setting, let the person know in front of the people present that you are concerned about the problem and that you would like to meet privately to find a solution. Do not promise anything and keep a positive attitude. Remember, your response will determine how people perceive the incident. If you act like a leader, and especially as a concerned leader, people will generally respond in a positive manner.

When in front of the membership, smile. A smile on your face will permeate throughout the room and will have an immediate effect on the group. This isn't to say there will not be times when a serious look or response is not in order. Sometimes it is even inappropriate to smile and you must be the judge. If you find yourself in a situation where it is important that you appear firm, you don't want to smile and look like a mindless fool. However, at most occasions you are building *esprit de corps* and need to serve as the "cheerleader" of the conference attendees.

It is always appropriate to say "thank you." You should remember to thank the membership for attending, for their support and for their hard work. You should thank the conference committee every time you get the opportunity, you should thank your vendors and sponsors for their support of the conference and you should thank your special guests and speakers for their attendance. In addition, you should also make an opportunity to thank the hotel staff for their hard work, if this is appropriate. People like to hear "thank you" and it adds warmth to your remarks.

Consistency in your remarks is also important. If you thank one vendor or sponsor publicly for its support, then you must thank all vendors and sponsors publicly for their support. Failure to do so will be noticed, not only by the sponsor but also by the membership. As President, you do not want to be accused of favoritism.

Be careful when listing people's names. You will usually miss someone, no matter how hard you try not to. It is sometimes better to recognize committee chairs and let them introduce appropriate members of the committee. If you must introduce a large group of people, write down the names and have the appropriate parties check the list. It is still possible to miss someone, but at least you have done everything possible to avoid this error.

Public speaking is a gift to some and a learned art to others. It is important that you develop public speaking skills if you are deficient in this area. The ability to energize people with the spoken word is phenomenal. You can turn a dull event into a memorable event by your remarks. If necessary, video tape yourself as you speak. Learn from your experience and make appropriate changes in style. When speaking, speak up, speak out and speak clearly and slowly. Eye contact with the audience is vital. An individual who reads a speech in a monotone voice can lull even the most excited crowd into a stupor or complacency in a relatively short period of time. A few years ago FASFAA had a speaker who read from cards in a monotone voice. On card 48, the sitting president had to tell her that we were out of time. That was one of the most memorable speeches because of how boring it was. Energy and excitement help make a speech work.

Though energy and excitement are important in public speaking, content cannot be ignored. When you speak, have something to say and make what you say memorable. Further, leave the audience wanting more and not wanting you to sit down. Well-structured remarks, tempered with a serious tone and intermingled with humor, convey their message. As you prepare for your presidency, develop a file on appropriate jokes and quotes. There are numerous books available to draw from. Interject these into your speaking and it will help people as they listen. Remember, you are speaking to a diverse group, so your humor and quotes must be appropriate for your audience. One of the most embarrassing events occurred when a speaker at a banquet used ethnic and gender humor. People become offended and as President it is not your job to offend. An example of an appropriate quotation comes from Mark Twain when he said, "There two things I know for sure, a river boat captain must learn more than a man should ever have to learn, and what he learns changes every twenty-four hours." Relating this to financial aid would be very appropriate, and in no way offensive. A joke that is inappropriate would be one like the following: "The tooth fairy, Santa Claus, an honest Fed and an old drunk were walking down the street when they all spotted a \$100 bill. Which one got the \$100? The old drunk of



course, since the other three are mythological characters." Always keep in mind that your remarks should be appropriate.

When attending a FASFAA conference as President, remember that you can never go wrong if you act as though you are the host and the members are all your personal guests. In the role of host, it is your responsibility to make each member feel as welcome and comfortable as possible.

### **Functions to Attend**

As President, you are expected to attend everything, and to stay for the duration. In reality, this is impossible, so you must establish your schedule ahead of the conference. There are some guidelines that will assist you with your planning, and hopefully keep you on track.

It is important that you attend and stay for all general sessions at the conference. General sessions are supposed to be important and you need to set the standard by demonstrating that they are important to you. Arrive on time and stay until the end when possible. If you arrive late or leave early, people assume that the general session was not too important. Again, appearance is very important.

Though it would be nice, it is impossible for you to attend every concurrent interest session. This is an opportunity for you to rotate and spend a few minutes in each session, visit with sponsors and exhibitors, or interact with members who are not in sessions. If necessary, this is also a good time to schedule meetings with people who need to speak with you, and even rest as your day will continue well into the night. Use this time carefully and to your advantage.

During breaks, be accessible to the membership. Try to speak with as many people as possible, and seek out new members. Speaking to a new member or a person who is attending a conference for the first time has a positive impact on that person's perception of FASFAA. As President, if you speak to a new person, he or she will remember that experience and feel like you are interested. When meeting new members, try to introduce them to another senior member of FASFAA. This will have further positive impact on the individual.

Hospitality suites are an added bonus at a conference. Though it is nice to stop by, it is not necessary to stay. If you can socialize for a brief period, this is an additional opportunity for you to have direct contact with the membership. Remember, the more contact you have the better.

Evening events are often long, but it is vital that you attend. Be a part of the festivities if at all possible. Show interest in the event and try to involve the average member. This is a time to have fun, so do. If an event is long and you decide to leave, your absence will be noticed and will reflect on the event. Do your best to stay as long as possible.

As you prepare your schedule, remember that you must allow time to rest and relax. You will have monumental stress imposed on you, and failure to take care of yourself will result in exhaustion, which results in less than peak performance. Take care of yourself!

### **Members' Expectations at Conferences**

Members expect conferences to be informative, entertaining and energizing. Even in years of doom and gloom, make sure you focus on upbeat themes and ideas. You should always have something positive to say and do. If you can help one person leave the conference with a renewed spirit, you have accomplished your mission. If members leave more depressed than when they arrived, you may have a problem. Generally the news from Washington and Tallahassee is gloomy. With this in mind, make sure your comments are positive and that keynote speakers are positive. Give people something to look forward to.

Members also expect access to you during conferences. This is something you can and should be able to do without any difficulty. Make yourself available as we have discussed above. If someone needs to meet with you privately, try to allow time for this.

Though you are not the conference chair, the membership still holds you responsible for the success or failure of the conference. Because of the importance of conferences to the members' opinion of you as President, it is critical that you maintain close contact with the person you have selected as chair, and provide guidance and direction as needed. If you are concerned about an event or a session, express your apprehension about it and, if necessary, exercise your right as President to cancel or change it. Should you have to do this, extreme diplomacy is needed. However, if you have worked with the conference chair and other key people in planning the conference, your chances of this occurring will be minimal. Make sure the Conference Chair keeps you informed throughout the conference as well. This is not the time for surprises.

Simply stated, the membership expects every conference to be perfect. They expect it to address every need they have had, have or will have. In addition, they expect it to be entertaining and worth the funds and time they spent attending. Further, they expect you as President to attend every session, social function and be available to address their individual needs. Though this might happen in a perfect world, it is not going to happen in the two conferences you are charged with. Accept the fact that you will have glitches, someone is not going to like something, you are not superhuman and cannot attend every event. If you realize the things you can and cannot change, you will have a better time at the conference and the membership will appreciate your positive, can-do attitude.

## **CHAPTER SIX**

### **COMMUNICATION WITH THE MEMBERSHIP**

#### **Developing a Communication Plan**

Communication is vital to the success of any organization. Isn't it hard to imagine an over-informed membership - especially in the field of financial aid? On the other hand, isn't it easy to imagine hearing a member say, "I didn't know that." With that in mind, the importance of an effective communication plan becomes self-evident.

In developing such a plan, a two step approach is suggested: quantitative and qualitative. The primary communication vehicles available within the association include the Newsletter, the FASFAA Flash, the telephone and other electronic devices, conversations, presentations, and of course, good old fashioned letter writing. In developing a communication plan, consideration should be given to the value of each of the available vehicles in terms of content, coverage, speed and cost. Examples: The Newsletter provides the greatest amount of information to the maximum number at the least cost to the association because its cost is offset by advertising. The Flash contains limited but urgent information to the entire membership, at a cost to the association greater than that of the Newsletter (since it does not contain advertising). Telephone and other electronic devices offer the timeliest feedback to a smaller number at greater cost. An exception would be the use of conference calls instead of meetings. The content, coverage and cost of meetings, workshops and conferences are difficult to quantify, but all have unique qualities that are necessary to the success and well-being of the organization. Letter-writing probably has the greatest impact of all. A personal letter from the president of the association is just that. It's personal - and what could mean more to any recipient? Its content is minimal, its coverage is minimal. In terms of cost, it's first class postage plus a few more cents for stationery and envelope. In terms of the president's time, however, it can be very consuming! Qualitatively speaking, the value of any product is based on its quality. The same is true for communications, both written and verbal. An

evaluation of the quality of the various communication vehicles should be made and incorporated into your overall plan.

The primary means of communication from the president is through the Newsletter. At a minimum, three issues are to be published. The Newsletter should contain a message from the President, in addition to its regular features. This is your opportunity to speak to the membership, provide information about your activities in representing the members, convey a thoughtful message, or whatever you deem appropriate. Because FLASHes are usually reserved for urgent messages, they may not be incorporated into your overall plan at the outset, but may be included if the need arises. You may wish to plan a few letters to the membership independently of the Newsletter. Your first one may provide information about your committees, their goals, their members, what you accomplished at the retreat, what the issues are for the year, or other such topics. A mid-year holiday message could provide a second letter to the membership; a third one could discuss relevant issues which have recently occurred. If you plan for such letters, you should review the schedule established for the Newsletter and space these letters at appropriate intervals in between. Your final message for the year is the Annual Report, which is discussed later in this guide.

### **The FASFAA Newsletter**

Regarding the Newsletter, it is worth noting here that it is one of the primary ways in which members judge FASFAA and assess the value of their membership, particularly by those who do not regularly attend conferences. FASFAA has, for the most part, been recognized nationally as a state organization with a superb newsletter. However, it has had its ups and downs over the years in terms of its value to the membership and the cost/benefit for the association. Some issues to consider regarding the Newsletter include the following:

- Choose your Newsletter editor with care. You want someone who can take the reins and work independently to meet the established deadlines. The editor should be an excellent communicator with good skills in grammar, construction, and judgment on topics to be included. Creativity is always a plus, as well as experience on the Executive Board.
- With the availability of desktop publishing software and its wide usage in the profession, FASFAA should refrain from using a typesetter. This greatly increases the cost of producing Newsletter issues and adds to the time needed to meet production dates.
- Periodically an evaluation of the newsletter should be done. Overall reaction to an issue can always be obtained by word of mouth, but a written evaluation form can easily be incorporated into an issue periodically. The membership is the audience. They are the readers and know what they like and don't like. They are a source of ideas for future issues.
- The most difficult job for any Newsletter editor is to get articles for each issue. This is usually a very time-consuming task for the editor, and requires repeated memos begging for articles. Planning ahead for what topics are to be included in each issue and assigning writing tasks can help to avoid this.
- You will want to work closely with the Newsletter editor to make sure that this primary means of communication meets your expectations. You will want it to reflect the standards you have set for your year as president as well as the image you want to project to non-members who read it. (See the section on Image Enhancement for more discussion of the Newsletter as it relates to image.)
- Either you or your editor should get on mailing lists to receive other state association newsletters. This can be a source of ideas for the FASFAA Newsletter. By the same token, you or your editor will be asked to send newsletters to other state and regional associations and they may want to use some of our ideas. Remember, however, that the Newsletter is copyrighted and articles reprinted in other publications can be done only with the permission of FASFAA.
- Remember also that members expect timely information to be included in the Newsletter. If an issue becomes delayed for any reason, you may need to work with the editor to develop some new articles, as

there is usually a negative reaction from the membership if an upcoming event being promoted in the Newsletter has already passed by the time news of it reaches the members.

- The Newsletter can serve as a vehicle to receive feedback and information from the membership, if used properly. For example, a challenge faced in every year by the leadership of FASFAA is the need to keep updated membership records. A standard form for address changes could be included in each issue. A membership application as a standard feature could help keep membership numbers up. A standard form for personnel changes could help keep the editor notified of these information items. These types of standard features would promote the flow of information and help the editor significantly.
- Although three issues are planned for publication, this is a minimum number to be used as a guide. In some years, additional issues have been printed based on available funds. To review prior issues of the Newsletter, contact the History Committee, as most of our previous issues are included in the Archives.
- The Newsletter is intended to be self-supporting; that is, its cost is completely offset by advertising. Thus any creative changes you plan to make must fit into the budget approved by the Board.

The role of the FASFAA Newsletter has evolved over the years. In the early years of FASFAA, the Newsletter was the primary means of communicating legislative issues at the state and federal levels, the status of federal legislation, and issues affecting the financial aid programs. In recent years, the focus of the Newsletter has been on association business and committee activities. This has been a natural change as communication on legislative and regulatory issues have become more abundant and expedient via other means. The Newsletter should fill a niche not covered by other publications, thus making it unique. The extent to which you would like the Newsletter to focus on these types of topics can be discussed by your Board or with your Newsletter editor.

### **Electronic Communication with Executive Board Members**

In recent years, electronic communication has become the norm for many of our members. As each office becomes more familiar with such methods and access is extended on a wider basis, we develop new ways of using technology to communicate with other members and assist in our communication efforts.

The Executive Board has been linked by electronic communication in recent years. This is an excellent method of communicating regularly and is more efficient than using the telephone. We have had some success in posting Board meeting minutes and announcements as well. However, since not all members are in the habit of using e-mail routinely, you should consider using the regular mail or other means of posting information for all Board members and committee chairs. Fax capability has also added speed to the communication efforts of the Executive Board. Be sure to consider what methods are preferable for the various types of communications you will have during the year.

## **CHAPTER SEVEN**

### **VISIBILITY AND EXTERNAL RELATIONS**

#### **Participation in FASFAA Events**

You must attend FASFAA events at every possible opportunity. The association President must be visible, and his or her support at meetings of regions, committees, sub-committees, etc. is very important to the membership of each entity. In instances where distance is a problem, or to share this function of leadership to others, send as your representative someone from the board who is in closer proximity to the activity. Make sure that the individual you select knows that his or her function is to represent the leadership of the association and discuss the person's role beforehand.

## **Attendance at Other Functions on Behalf of FASFAA**

Although of secondary importance and time consuming, there are non-FASFAA functions at which the presence of the President is important. For example, you may be asked to attend a conference or meeting held by admissions professionals or business officers; you may be invited to speak at another state association meeting; or you may be asked to provide testimony on state or federal legislation. Look to your Executive Board, and in particular, to the immediate past president, for guidance in determining which functions to attend. Here are some general guidelines which may be of help in considering outside invitations.

- The President has a budget category for travel which cannot be exceeded without approval from the Executive Board. Therefore, such travel expenses must fit into your existing budget.
- Consider the cost/benefit ratio. What will be gained from attending the function? Will it be worth the cost of attending?
- Before accepting speaking engagements that shall be financed by FASFAA, consider what benefits will be realized by the members of FASFAA. Will it be the start of an ongoing relationship between two organizations? Is it for image enhancement? Will it help to lay the groundwork for developing a sound future relationship with FASFAA? Is it an obligation based on past relationships with the organization?
- Even if the organization or person extending the invitation will pay the costs, it is still important to understand the benefits to FASFAA, as your time will be taken from FASFAA initiatives in order to do this.
- It is also important to consider the topic you're being asked to present. Is it a "financial aid" topic or is it a "FASFAA" topic? Are you indeed the best person to accept the invitation, or should someone else attend on your behalf? For example, if you are asked to present information about which you are not well-versed, perhaps sending someone who is more familiar with the topic would be better. If you are being asked to speak on a general financial aid topic and your attendance at the function would mean travel expenses would be incurred, and someone locally could present the same information, you would do well to ask that person. Were you invited because the group really needs to hear from the President of FASFAA or because they need a financial aid presentation and were referred to you because of your title? Because you may not be anxious to accept additional travel duties in addition to your other responsibilities as President, you may wish to share these kinds of activities with other FASFAA leaders.
- When accepting speaking engagements during your year as president, the most important thing to remember is who you are representing. If you are speaking or acting on behalf of FASFAA as its President, you must make sure that you are representing *all* of the members of the association. Do not speak on behalf of only your sector or your institution as you must represent all sectors and all institutions within the organization.
- When speaking to non-FASFAA members about the organization, be prepared with specific facts about the organization, such as how many members we have, how many institutions are represented, what types of activities we are involved in, etc. Others will draw conclusions about FASFAA based upon your comments, and they should help to create a positive image for all of our members.

## **Image Enhancement**

Perhaps the greatest challenge to the individual financial aid administrator is being perceived as a number cruncher instead of a professional. As President of FASFAA, you will have the opportunity to help influence the image of individual members and of the profession as a whole. In addition, you will have a wonderful opportunity to enhance your own reputation and image at your institution and with the membership.

Association image enhancement is a challenge, indeed. And your role as an image creator should not be taken lightly. You should do everything you can to positively influence the image and establish the credibility of the association's members and of financial aid administrators in general. The extent to which you wish to make this

a specific agenda item for the year is up to you. Whether you identify it as a goal or not, it will occur on its own!

Generally speaking, a positive image is created by doing worthwhile things, and then telling people about them. A number of methods could be employed to highlight some of the activities FASFAA undertakes. For example, the Executive Board might want to select a target group and expend extra effort throughout the year in enhancing the association's image with that group. Possibilities include institutional presidents, student services administrators, business officers, legislators, guidance counselors, etc. Another method would be to recognize someone for their contribution to student aid, such as a legislator or agency administrator and invite the honoree to a conference to receive it. This helps to build future relationships with the organization the honored person represents.

A word of caution is in order regarding interaction and communication with such constituents, however. Use exceptionally good judgment in sending publications (such as the Newsletter which may contain pictures of members at hospitality or social functions) or letters (which may contain typographical errors). When sharing information, be sure it is something that will be of interest to, and create a positive impression upon, the recipient.

You can help your volunteers build their images on campus by writing to appropriate administrators indicating how valuable that member's service has been to the organization. As President, no one is assigned to write a letter on your behalf unless you ask a member of your Executive Board to do so. However, many presidents invite their institutional president or supervisor to attend one of the two conferences during the year. This is a wonderful opportunity for him or her to see you as the focal point during a conference. In some cases this can cause additional stress during a conference, so use your own judgment as to whether this would be beneficial to you.

### **Other Association Commitments/Expectations**

#### Southern Association of Student Financial Aid Administrators:

SASF AA commitments will begin during your year as President-Elect. Traditionally, you will be invited to attend a one-day meeting just prior to the annual conference. At that meeting you will meet the presidents-elect from the other states in the region and the President-Elect of SASF AA. This is the group you will be working with on the SASF AA Board during your three-year commitment. FASF AA will cover your expenses for the additional day, but not for attending the conference. The Board meeting just prior to the start of your year as president (usually in May or June) is one at which SASF AA invites the incoming Board members. FASF AA will pay your expenses to attend the one-day meeting.

During the year you serve on the SASF AA Board as President of FASF AA, you will be expected to give a state report. The President will advise you of any special requirements and schedule of reports due to the SASF AA Newsletter on behalf of FASF AA. You may appoint your Newsletter Editor to be the one to submit your state reports, if you choose. There is also a brief, annual report due at the last meeting. Check previous issues of the SASF AA Newsletters for samples of the reports which have been given on behalf of FASF AA.

There are a set number of Board meetings scheduled during the year, usually held in July, November, February and June. FASF AA will pay your expenses to attend.

At the Annual SASFAA Meeting, there will be a state meeting. Although this is not an official FASF AA business meeting, you can use it to welcome members to SASFAA, talk about upcoming FASF AA events, have key members discuss their committee activities, etc. Usually a group picture is taken for the Newsletter, so it is helpful to have arranged in advance who will be in charge of the photo.

SASF AA Board meetings are often scheduled to include at least one day of a weekend. Summarizing the expenses for which you will be reimbursed: SASFAA does not cover your costs (as President-Elect or President) to attend a SASFAA meeting - FASF AA does. However, as a committee member, SASFAA will pay your expenses to attend a meeting of the Nominations Committee, which will be your function during your year as Immediate Past President. This occurs in the Fall.

At the Annual Conference during your year as Immediate Past President, you will have some light responsibilities in connection with the election of officers. This may involve a few hours at the polls and a meeting to count votes.

### National Association of Student Financial Aid Administrators:

NASF AA keeps in touch with each state association president. Each previous president provided your name and address as the incoming president and you will be put onto the mailing list. NASFAA sends monthly reports and other materials for state associations.

There is a Leadership Conference which is held every spring, usually in Washington, D.C. FASF AA pays for one or two members to attend. Although not specifically stated in policy, it is most beneficial for the current President-Elect or incoming President-Elect to attend. By the time you have assumed the position of president, you will be past the planning stage of your term of office, and you will also have less time available. The conference is attended by leaders of all the state and regional associations and it is a good opportunity to network and to learn about what activities the other associations are involved in. The Executive Board approves who will attend the conference on behalf of FASF AA.

The annual meeting of NASFAA occurs in July and FASF AA will pay your way to attend the NASFAA conference during the year you serve as President. Thus one of your first official functions will be to attend the conference. Often there is an event at which state presidents are invited, and you will be notified by NASFAA.

At both SASFAA and NASFAA conferences, it has been a tradition for FASF AA members to wear pink "Florida" ribbons while attending. This provides an easy way for FASF AA members to identify other people from Florida who they may not know, and gives FASF AA a sense of identity at these larger meetings. Be sure that an adequate supply of Florida ribbons exist or are obtained prior to these conferences. Either you or someone you designate should be responsible for distributing them to the FASF AA members at the conference.

## **CHAPTER EIGHT**

### **WRAPPING UP YOUR YEAR AS PRESIDENT**

#### **Thanking Your Volunteers and Sponsors**

Volunteers, sponsors and others should be thanked from the podium at each appropriate occasion. Of great importance is the personal thank you note from the President that should follow each event that involves volunteers and sponsors, as well as others whose contributions should be acknowledged. Regional representatives should also write thank you letters after regional meetings or other activities. You should encourage your Board members and committee chairs to write thank you notes at every opportunity.

As mentioned under the section on image enhancement, you should plan to write letters to the supervisors of your Board members and committee chairs *if they so desire*. At the March or final meeting of the Board, it is customary to ask which members would like you to write to their supervisors and obtain their names, titles, and addresses.

At holiday time, many presidents have sent holiday cards to sponsors and/or volunteers. Along with a nice note of thanks, these can be especially meaningful. Other presidents have purchased inexpensive gifts to send with thank you notes after a particular accomplishment of a committee.

Although the Awards Banquet is the traditional and official thank you for each volunteer, sending a thank you note individually at the end of the year is also a special way to convey your appreciation.

Sponsors are generally recognized at a reception hosted by Executive Board members. This is done either once, at the spring conference at which other members are recognized for their contributions for the year, or at the fall and spring conferences, for their contributions at the conference. This is usually a decision which will be made by you, your conference chairs, the sponsorship chair, and with input from some sponsors and vendors. A small gift is usually provided to each contributor. Either you or your sponsorship chair will be the speaker for the event, so keep in mind that this is another speaking function for which you will need to prepare. In addition, keep in mind that sponsors enjoy having their own names called (not just their organization's) and that the gift bestowed should be a memento that they can keep in their office or home and should be appropriate for everyone.

### **Awards Ceremony and Considerations**

Traditionally held at the Spring Conference, the awards banquet is the time to honor and recognize all of the volunteers contributing to a successful year for their participation, whether it was on a committee or task force, as an officer, or as a participant on a special project. This is one of the truly enjoyable tasks you have as President, for you know how much time and effort colleagues spent in serving the association. Additionally, you may present a member with one of our special awards, such as lifetime membership or other recognition according to our policies.

Work closely with the Conference Chair in planning the awards ceremony, bearing in mind that:

- Although the banquet may take many forms, it is usually considered a formal occasion, in both conduct and attire.
- Members being recognized for their volunteer service like to hear their names spoken, and/or see their names in a newsletter or program;
- The vast majority of the audience is not being recognized, and will find the ceremony very tedious and boring if you are not prepared and do not keep the award function moving at a fast pace.

It is difficult, but very important, to achieve the appropriate balance between the need to provide adequate recognition and the need to avoid boredom for the audience, however, some suggestions include:

- Giving the committee chairs and officers their plaques and letting each of them distribute the certificates to their own committee members;
- Having a printed program for the awards banquet, and listing all committee members.
- Rather than recognizing individual committee members, asking them to stand as you cite a major accomplishment of the committee, e.g., "Please stand if you are a member of the Training Committee or assisted the Training Committee in any of their workshops."
- Orchestrating the flow of members to the front of the room so that it moves rapidly and so that the audience does not need to wait for each person to arrive at the front while nothing is being said.
- Having another person read the names while you give the plaques and thank the members.



- Having another member make the presentation of a special award usually has more meaning for the recipient and provides some variety in speakers. Select a close friend or employee or mentor of the person being honored to actually make the presentation.
- If you have a featured speaker, the topic should either be light-hearted (sometimes funny is best) or relevant to the idea of volunteer service or association work. Most of all, it should be very brief (not to exceed 15 minutes). If you are also making more than one special award such as lifetime membership, a featured speaker will probably make the banquet much too long.
- Be prepared to "emcee" the ceremony. Even though you are not making a single, long speech, have your thoughts written down. In this function more than any other of the conference, time considerations, flow of the various elements (welcome, eating, awards presentation, remarks, etc.) is essential.

In summary, the Awards Banquet can either be a highlight of a conference, and of your year as president, or it can be a long, dull, meal in uncomfortable clothes! Careful planning and execution can help to make it a successful and enjoyable event for all who attend.

### **Preparation of the Annual Report**

FASFAA ByLaws require you to present an annual report to the membership, which you should send as soon as possible following the Spring Conference. Some topics you may wish to include in your report include:

- An introduction in which you describe how your theme (if you have one) was addressed or what goals you had at the beginning of the year;
- A detailed summary of all committee activities and conferences;
- A detailed summary of other activities achieved by the Executive Board or other groups;
- A current budget performance summary or other discussion of the association's finances;
- A summary of any incomplete official resolutions to be addressed in the next year;
- Your appreciation of all of the volunteers who served the association and encouragement to new members to get involved;
- Anything else you deem appropriate.

Perhaps the best way to develop your report is to view it as your review or encapsulation of FASFAA activity for the year. Future officers and Executive Boards will use the report as their reference to provide continuity of policy in association activities and as a resource for the types of activities which occurred.

Before you begin writing your report, you should read some of the excellent reports prepared by presidents in the past, and you will feel much more comfortable organizing your report. It has also been customary for the President to ask each officer and committee chair to provide a written summary of their activities (usually at the Executive Board meeting held in March, to be due by the final Board meeting). This will provide you with a wealth of information which you can then condense and organize into your annual report.

The report should either be mailed to each member or distributed to conference attendees. Although some presidents have distributed their report to the membership at the Spring Conference of their year, this schedule prevents many of the activities from being included. If you decide to mail the report to all members, it will be more expensive but more closely meets the intent of the requirement.

### **Being a "Has Been"**

On June 30 of your year as President, you'll relish being demoted to a "has been!" No matter how much you enjoyed the year, you will enjoy moving on to other tasks and re-dedicating yourself to projects which you may have placed on the back burner during your presidency. Most past presidents look upon the completion of their term of office with a sense of both accomplishment and relief, and no doubt you will too.

After an exhilarating year as President, be prepared for a bout of "Post Party Depression." To help ease you through the transition period, schedule a fun activity or trip, or take up a new hobby.

As Immediate Past President, you'll have the opportunity to serve on the SASFAA Nominations Committee and act as advisor to the incoming President and new Board. Whatever you can do to ensure a smooth transition between the two years will be most appreciated by the new leadership. Your role should be to facilitate the actions and decisions of the new leaders, while allowing the new President to lead the association.

Before you relax into a less hectic pace, however, be sure to tie up any loose ends that remain as a responsibility of your term as President. Such things may include completion of your annual report, thank you notes to your volunteers, follow-up from the spring conference, etc. Then enjoy your year as a "has been" to the fullest!

## **CHAPTER NINE**

### **WHERE TO GET HELP**

#### **Sources of Help**

It is only natural that you will, at some point, feel that you need help. Not to worry! Help is available in many forms. Here are some suggestions which can be extremely beneficial as you begin planning for your presidency.

Identify one or more mentors. You probably already have mentors with whom you discuss financial aid issues. Now you may wish to identify a small group of past presidents who are willing to spend some time with you on an ongoing basis. It may be helpful to meet with these individuals prior to your term of office. You will also want to have someone you can consult during your term of office when issues come up that you feel a second or third opinion would help. Don't feel that you would be imposing on someone to act in this capacity; you would be flattering them by asking for their input.

It is impossible to stress how valuable the FASFAA Bylaws and Policy and Procedure Manual can be to you. Most of the questions you will face are answered in the Policy and Procedure Manual. Before you complete your term as President, you will have had to review virtually every policy and procedure; thus if you are not already extremely familiar with these, you should do a thorough reading of the contents of this binder. It will be of great assistance to you right from the beginning.

Your greatest source of assistance can be past presidents of FASFAA, and of other associations. In particular, you should utilize the experience and advice which will be automatically built into your Board by virtue of the Immediate Past President. His or her experience will be the most recent, and therefore perhaps the most relevant, depending upon the issue.

Other key members who have experience in various positions in FASFAA can be a vital source of information and expertise. These members can help you with FASFAA responsibilities, but can also help you stay in touch with relevant issues of the membership.

Understanding and being familiar with the history of FASFAA can be extremely informative. The best source for information is the history of the association's first 25 years, entitled "25 Years of FASFAA." Copies are available from the Archives.

Robert's Rules of Order is must reading for you and should be available for reference during your term of office.